ePrivateWealth: Frequently Asked Questions

GLOBAL PRIVATE WEALTH SOLUTIONS

Swiss Life Global Solutions has launched a new online portal, ePrivateWealth, for its partners. What is the purpose of the portal?
ePrivateWealth is a digital servicing platform designed to serve as a collaborative platform for our partners. It offers digital services to enhance availability and servicing capacity by combining the knowledge and expertise of our +200 experts.

What are the advantages of ePrivateWealth?
- A fully digital insurance application process for business partners
- Round-the-clock access to wealth planning expertise
- Up-to-date e-learning materials
- Self-service access to the latest brochures, product documents and forms

On which devices does ePrivateWealth work?
ePrivateWealth is an online platform that can be accessed by any device. It is responsive and accessible via a web browser, which can run on a computer, tablet or mobile phone. There is currently no mobile app available. The portal does not allow users to work offline.

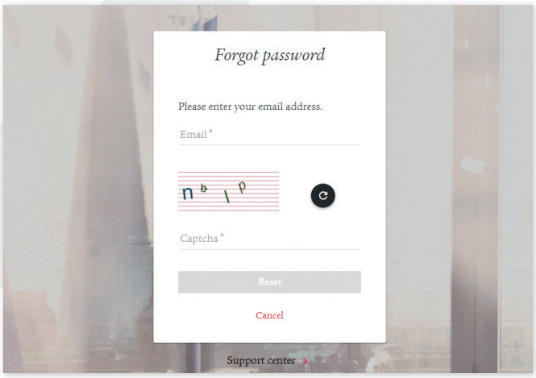
How can I get access to ePrivateWealth?
Before you can access the portal, you will need:

- To be a recognised business partner of Swiss Life Global Private Wealth Solutions
- A personal email address from your company
- A mobile phone number for two-factor authentication via SMS

Users will be authenticated with a username (email address), a password and a SMS verification code.

Please click on the “ePrivateWealth Access Request” link on our online Support services page www.swisslife-global.com/online-services/ePrivateWealth.html to access the request form. Enter your data and submit the form. Our Partner Management team will review your request to ensure that you are an authorised business partner before assigning a user account to you. If you are authorised, you will receive an invitation email from Swiss Life. In case you do not hear from us, please check the junk e-mail folder in your mailbox for the invitation email before contacting us to enquire about the status. Follow the steps in the invitation email to activate your account and it will lead you to ePrivateWealth. We recommend that you add ePrivateWealth to your favourites in your browser in order to conveniently access the portal again.

How can I reset my password?
To reset your password, click on the “Forgot password” link on the login page and enter your email address. To prevent spamming, you will be required to enter a Captcha code. Click on “Reset” to submit the form. You will then receive a password reset link via email.



Note:
- The password must be at least 6 characters long and must contain at least a number, a small letter and a capital letter.
- The Captcha is not case-sensitive. If a character has a line across it, it is also part of the Captcha code. For instance, the Captcha code for this image is nblp

Contact: partner.management@swisslife.com

How can I reset my mobile phone number?
Please log in and go to "User Profile" on the top left of the screen to update your mobile phone number. In case you would like to change your registered mobile phone number but could not log in to ePrivateWealth, please contact our Partner Management team via partner.management@swisslife.com.

Why can't I log in?
In order to log in, you need your email address, your password and your verification code. The verification code will be sent by SMS to the mobile phone number registered with us. Please note that passwords are case-sensitive. If you have forgotten your password, please use the "Forgot password" link to reset it.

Where can I get support for ePrivateWealth?
Please visit our online Support Center at https://www.swisslife-global.com/online-services/ePrivateWealth/manual.html to get immediate support for frequently asked questions.

Otherwise our Partner Management Team will be available to assist you from 9am – 5pm on Mondays to Fridays either via email partner.management@swisslife.com or by phone +352 42 39 59 415.

Are there any special installation or security settings that need to be done by my local IT before I can use ePrivateWealth?
No special installation is required by your local IT. ePrivateWealth runs on a typical web browser, so the browser's version should be kept up-to-date.

Is there a session timeout?
Yes, there is a session timeout based on a certain duration of inactivity. This will be set to one hour initially and may be adjusted later depending on feedback from the users.

Is my data secure within ePrivateWealth?
Yes, we have taken organisational and technical steps to ensure that your data is protected against unauthorised access. We use the most secure cryptographic services (SHA-256) to encrypt the passwords and other sensitive data. The website is using a trusted certificate provided by a Trusted Root Certificate Authority. The protocol used is encrypted (TLS over HTTPS).

Where can I find legal information concerning ePrivateWealth?
The Terms of Service, Privacy Notice and Cookies Policy of the portal are available online at https://www.swisslife-global.com/online-services/ePrivateWealth/manual/terms-of-service.html,

https://www.swisslife-global.com/online-services/ePrivateWealth/manual/privacy-policy.html, and

https://www.swisslife-global.com/online-services/ePrivateWealth/manual/cookies-policy.html

Are the forms available in ePrivateWealth the latest version?
Yes, please always refer to ePrivateWealth for the latest version of the forms. Forms obtained from other sources may be outdated.

GPW – EN – FAQENPRIVATEWEALTH – 06.2018